



GoMBC Supervisor Manual

VERSION 1.1. LAST UPDATED JULY 23, 2021

The **Merit Based Compensation (MBC)** program manages LE Staff performance and provides an annual variable monetary reward based on an employee's individual performance and contribution to the mission. The reward employees receive is linked directly to their performance.

At the end of the performance period, the employee's demonstrated effort and contribution are assessed based on specific **performance criteria**.

Locally-employed staff with effective performance (defined as a **Total Performance Score** of 100 or more) receive a monetary reward aligned with their level of performance.

The program requires and supports supervisor and employee collaboration to set performance goals, improve skills, and find opportunities for professional development.

This manual covers GoMBC operation. For MBC policy, refer to the **Performance Management Policy for MBC**.

GoMBC

GoMBC is the application that allows posts and missions to electronically process performance documents for **Locally-Employed staff (LE staff)**. This cloud-based application helps you manage the status of

- Employee Performance Reports (EPRs)
 - Annual Work Plans
 - Development Plans
 - Mid-year Discussions
 - Scoring and approval (at the end of the rating cycle)
- Probationary period certification
- Performance Improvement Plans (PIPs)
- Employee appeals

The GoMBC app is managed by your local HR office. Your actions in GoMBC depend on your role. As a rating supervisor, you will use it to create performance documents, comment on and certify performance, and offer developmental support. As a reviewing supervisor or pool supervisor, you will review performance documents prepared by the rating supervisor.



Want to learn more about the MBC program? Talk to HR or see your post's **LE Staff Handbook**.

TABLE OF CONTENTS

GOMBC.....	1
ACCESSING GOMBC	6
State.gov Accounts	6
Other Government Accounts.....	7
Welcome to GoMBC!	8
UNDERSTANDING ROLES.....	8
Employee	8
Rating Supervisor	9
Reviewing Supervisor.....	9
Pool Supervisor	9
Mission/Post HR Administrator and Mission/Post HR Manager	9
GETTING AROUND	9
Main Menu.....	10
Dashboard.....	11
MANAGING DOCUMENTS	11
Reviews	12
Performance Improvement Plans.....	13
Appeals.....	13
FINDING EMPLOYEES	14
Supervisor Actions	14
Dive into Pools	15
THE MBC RATING CYCLE	16
Defining Performance	16
Performance Criteria.....	16
Development Plan.....	17
Reflecting on Performance	17

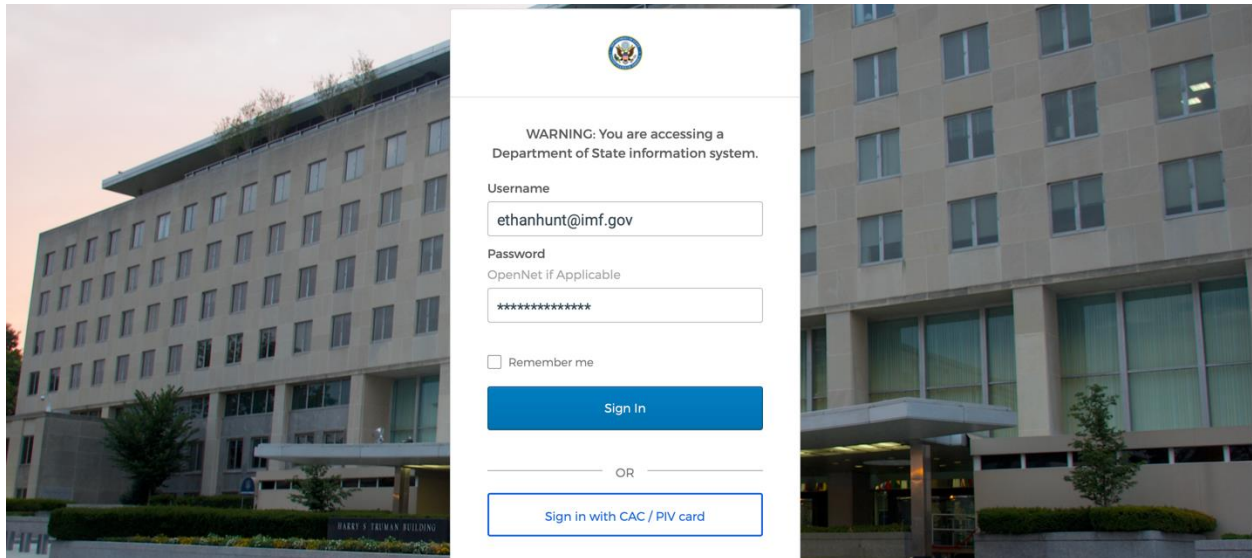
Evaluating Performance	17
ANNUAL WORK PLAN.....	18
Initiating the AWP	18
Review Period	19
Performance Year	19
Review Period Date Range	19
Probationary Period	19
Copy From (Existing Employee Info)	19
Filling out the AWP	19
Confirming Job Details	20
Details of the Annual Work Plan	20
Universal Job Elements	21
Development Activities	21
Confirming the AWP	22
Checking AWP Status	23
Updating the AWP	23
MID-YEAR DISCUSSION	24
Updating the AWP	24
Adding New Objectives	24
Certifying the Mid-Year Discussion	25
EMPLOYEE PERFORMANCE REPORT.....	26
Starting the Review	26
Adding Ratings	27
Development Activities	28
Certifying the EPR	28
Reviewing and Pool Supervisors	29
Releasing the EPR.....	30
MANAGING PROBATION	31
Starting Probation	31
Ending Probation.....	32
Completion of Probation and Continuation of Employment.....	32
Extension of the Probationary Period.....	33
Separation	33

PERFORMANCE IMPROVEMENT PLAN	34
Creating a PIP	34
Section 1—Employee Data	35
Section 2—Areas for Improvement	35
Section 3—Reasons for Improvement	35
Section 4—Actions Needed	35
Section 5—Assistance Provided	35
Section 6—Timeframe	35
Section 7—Signatures	36
Sharing the PIP	36
Sharing with the Employee	36
Reviewing Performance	37
Extending the Timeframe	38
APPEALS	39
APPROVING CALCULATIONS IN RCA.....	42
Tier 1 Approval.....	43
Tier 2 Approval.....	43
Tier 3 Approval.....	43

ACCESSING GoMBC

GoMBC is available online at gombc.state.gov

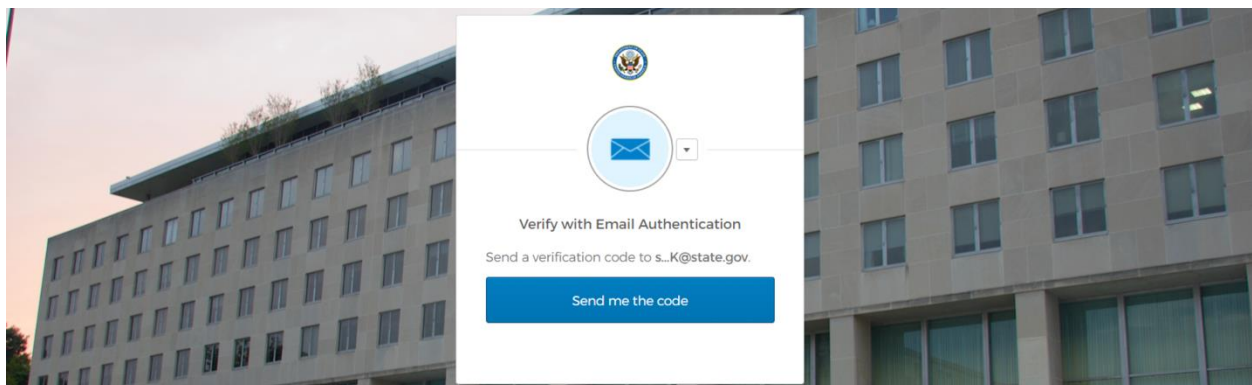
You can sign in from any web browser, but you will need to use an official government account (.gov or .mil) and may need to verify your identity.




STATE.GOV ACCOUNTS

If you have a state.gov account, you can access GoMBC directly from an OpenNet computer using single sign-on. You won't need to verify your identity.

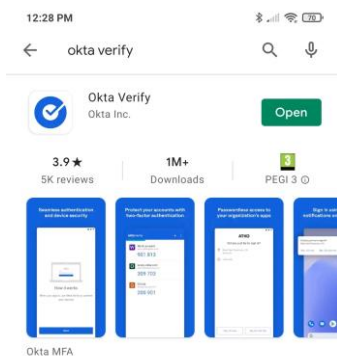
Not on OpenNet? Go to gombc.state.gov and enter your DoS username and password. You'll be prompted to either send a verification code to your email account or use the Okta Verify app (see below) to confirm your identity.



 Using a CAC/PIV card? Instead of typing a username and password, you can **Sign in with CAC/PIV card**.

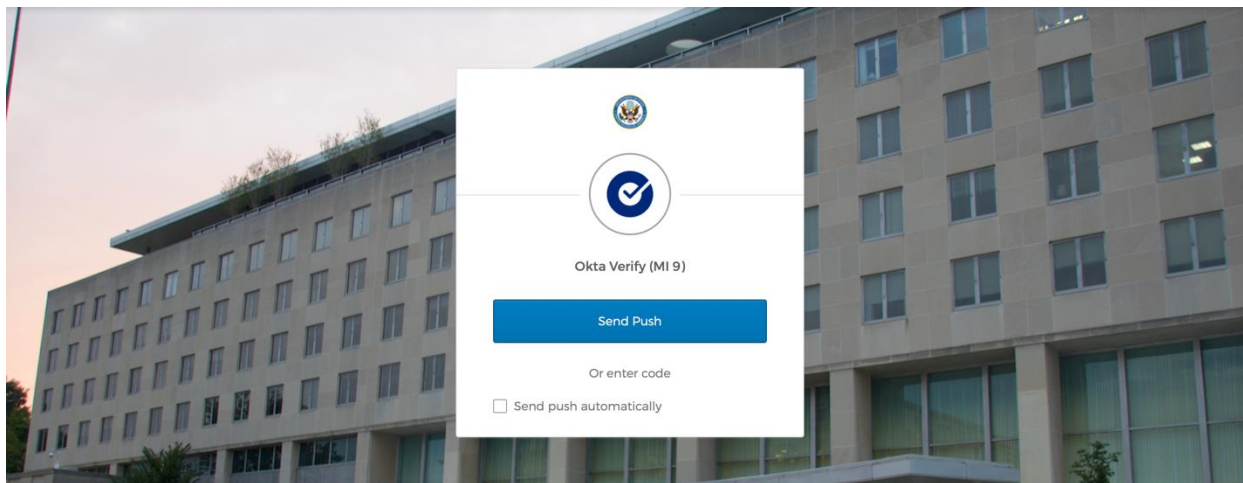
OTHER GOVERNMENT ACCOUNTS

If you use a **Foreign Affairs Network (FAN)** account or another government agency account (one already enrolled in Okta), you will need the **Okta Verify** mobile app. This free app is available for iPhone and Android. Download it ahead of time from the Apple App Store or Google Play Store.




Get Okta Verify for iOS or Android.

Go to gombc.state.gov and enter your FAN or agency username and password. Then hit [Send Push](#) to send a notification to the Okta Verify app installed on your phone. Respond to the notification to confirm that yes, it really is you.



Send Push sends an access notification to your phone.

 Push notifications not coming through? You can also try the **Or enter code** option. Open the Okta Verify app, find the six-digit number for state.okta.com and enter it into the website. Be quick—the number changes every 30 seconds.

WELCOME TO GOMBC!

Once signed in your browser will take you to GoMBC automatically. Read over the privacy notice before you [Log in](#).

First time here? If you're not an LE staff member you might be asked to register. If so, you will see the User Registration screen where you can enter your details. LE staff will be registered by HR and should not register.

Your completed registration will need admin approval. You will receive an email when everything's ready.



The screenshot shows the 'User Registration' form. It includes fields for 'User Name (login)', 'Name (Last Name, First Name Middle-Initial)', 'Job Title', 'E-mail Address', and 'Post'. Below these is a section for 'Is Employee Local Staff' with a 'No' radio button selected. A red circle highlights this section and the 'Register' button. A 'Back' button is in the top right corner.

User Registration Back

User Name (login)
MusgraveJ@state.gov

Name (Last Name, First Name Middle-Initial)
Musgrave, John Q

Job Title
Field Analyst


E-mail Address
MusgraveJ@state.gov

Post
01

Is Employee Local Staff
☐ No

Register

Non-LE staff should Register a GoMBC account to be approved by HR.

 If you're not sure which account to use or have any other trouble getting into GoMBC, speak to your HR office at post.

UNDERSTANDING ROLES

GoMBC uses **roles** to help people carry out tasks appropriate to their job. The role you hold in the app provides access to documents and actions corresponding to your role in the MBC process.

EMPLOYEE

All LE staff hold this role. It provides them with access to their **Employee Performance Report (EPR)** (including the **Annual Work Plan**), and any pending **Performance Improvement Plans (PIPs)** or **Appeals**.

RATING SUPERVISOR

This is usually the employee's immediate supervisor. The Rating Supervisor creates the **Annual Work Plan**, the **Development Plan**, documents the **Mid-Year Discussion**, and completes the **Employee Performance Report**.

REVIEWING SUPERVISOR

The Reviewing Supervisor reviews each scored EPR completed by the **Rating Supervisor**. They may also review AWP, PIPs, and Appeals as needed.

POOL SUPERVISOR

The Pool Supervisor is a senior-ranking UDSH accountable for a performance pool. They are the guardian of fairness and consistency. They make sure performance scores and written justifications on employee EPRs are consistent with performance for all employees in their performance pool.

MISSION/POST HR ADMINISTRATOR AND MISSION/POST HR MANAGER

The Human Resources Officer (HRO) and HR staff administer the GoMBC application. They manage employee records and help supervisors complete performance documentation. HR approves and finalizes documents within GoMBC and provides training and consultation.



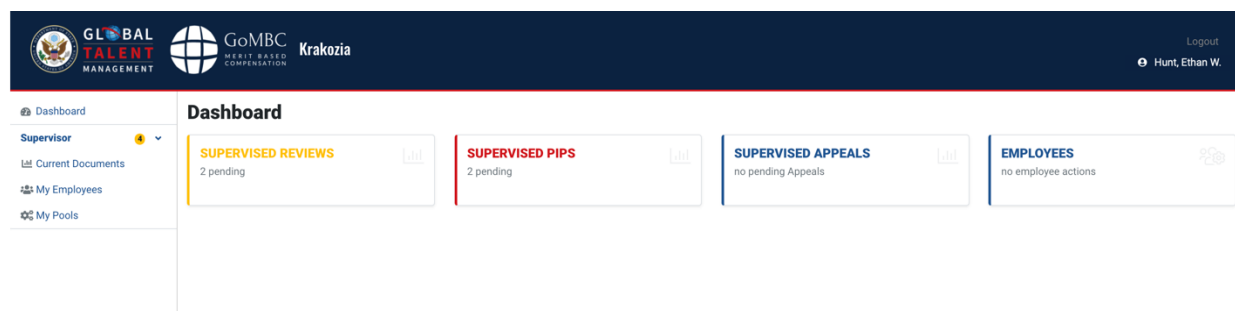
Sometimes a person will hold more than one role, depending on their job requirements.

GETTING AROUND

GoMBC's main home screen is where you access all the documents and tools you need to complete the performance management process. This area includes the **Main Menu** for navigation and the **Dashboard** that summarizes any actions you need to take.

After logging in, you will arrive at the home screen. Up at the top is the name of your home location, or the one you last accessed. If you work across more than one location, make sure you're in the right place.

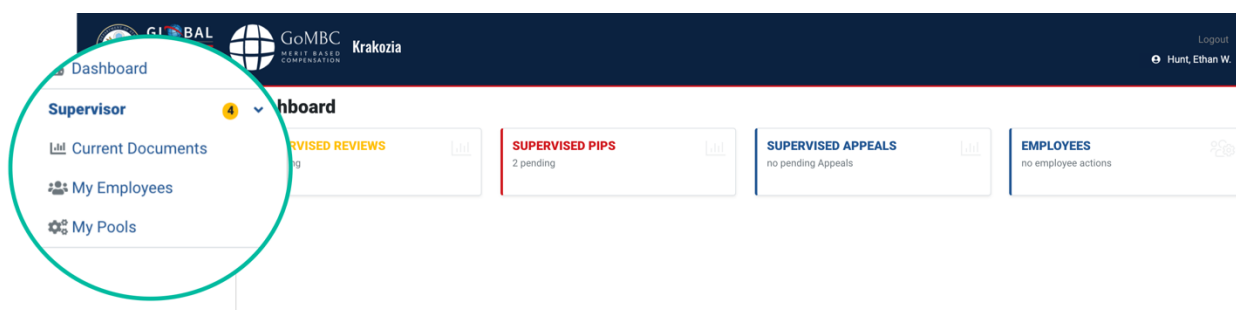
Exactly what you find here depends on the **roles** you hold in GoMBC.





GoMBC's home screen with main menu (left) and dashboard (right).

MAIN MENU

Use the menu to navigate to documents, tasks, and your supervised employees for each role you hold.



The main menu has sections for each role you hold.

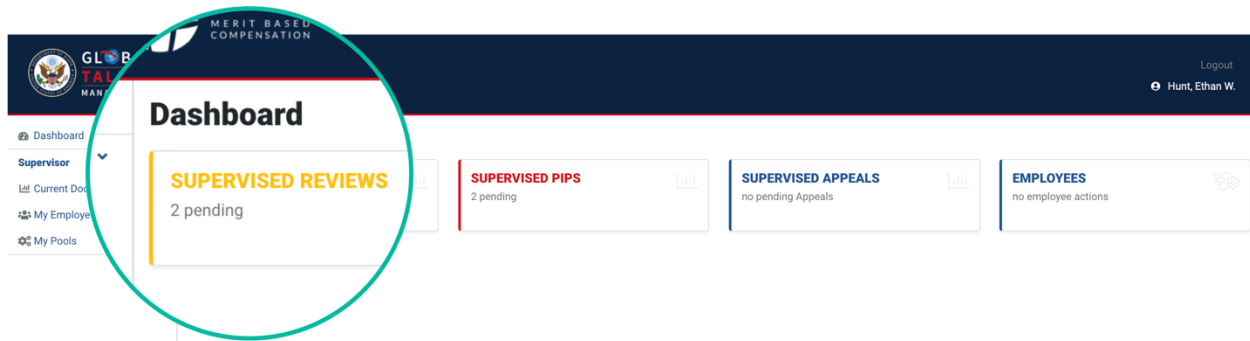
 Got actions to take? Menu headings for each of your roles are badged (like this: ) to let you know.

As a **Rating Supervisor**, **Reviewing Supervisor**, or **Pool Supervisor**, the menu takes you to all the performance documents for the employees you're assigned to in each role. These include **Annual Work Plans**, scored **Employee Performance Reports**, **Appeals**, and **Performance Improvement Plans**. From the menu, select [Current Documents](#) to find them. For a list of the employees you support, choose [My Employees](#).

As a **Pool Supervisor** the [My Pools](#) option directs you to any performance reports ready for review in your pool.

DASHBOARD

Think of the **dashboard** as your to-do list in GoMBC. Use it to keep track of your pending tasks. What you see here depends on the **roles** you hold.



The dashboard reports the outstanding tasks for each role you hold.

As a **Rating Supervisor**, **Reviewing Supervisor** or **Pool Supervisor**, your dashboard collates and links to the documents you are assigned to manage or approve. You will see whether any are **pending** an action from you.

SUPERVISED REVIEWS are the **Employee Performance Reports** you're assigned to create, edit, or approve.

SUPERVISED PIPS links you to **Performance Improvement Plans** for employees you support.

SUPERVISED APPEALS is where to find any **Appeals** lodged by employees you support.

EMPLOYEES gets you to the documentation and performance ratings for all employees you supervise.

MANAGING DOCUMENTS

Navigate to all your **Current Documents** for this rating cycle from the **Main Menu** or by choosing a document category from the **Dashboard**.

This area organizes documents into **Reviews (EPRs)**, **Performance Improvement Plans**, and **Appeals**.

What you can do here depends on document type and status, and on your **role**.

The screenshot displays the GoMBC Supervisor interface. The top navigation bar includes the Global Talent Management logo, GoMBC logo, and the user's name, Hunt, Ethan W. The main content area is divided into four sections: Current Documents, Current Reviews, Current Performance Improvement Plans, and Appeals. The 'Current Documents' sidebar on the left is circled in red. The 'Status' dropdown menu in the 'Current Reviews' section is circled in red. The 'Actions' button in the 'Current Reviews' section is circled in red. The 'Status' dropdown menu in the 'Appeals' section is circled in red.

Status	Period	Employee	Start	End	My Roles	Actions
AWP Created	Annual	Faust, Ilsa	02/01/2021	01/31/2022	Rating Supervisor	View AWP
Pending Rating Supervisor Release	Annual	Meade, Julia	02/01/2020	01/31/2021	Rating Supervisor	
AWP Started	Interim	Dunn, Benjamin E.	08/02/2021	12/14/2021	Pool Supervisor	
Pending Reviewer Approval	Annual	Mitsopolis, Alanna	02/01/2021	01/31/2022	Rating Supervisor	
MYD Acknowledged	Interim	Walker, August	02/01/2021	07/15/2021	Pool Supervisor	

Status	Employee	Start	End	Actions
Pending Rating Supervisor Review	Stickell, Luther J.	05/12/2021	07/11/2021	
PIP Created	Debruuk, Nils	05/05/2021	06/04/2021	
	Huntley, Alan	04/19/2021	05/19/2021	

Status	Employee	Actions
Approved	Stickell, Luther J.	
	Debruuk, Nils	
Canceled	Huntley, Alan	

Current Documents shows reviews, PIPs, and Appeals for the current performance year.

This icon will alert you to documents that need urgent attention.

REVIEWS

This section holds current **Annual Work Plans (AWPs)** and **Employee Performance Reports (EPRs)**, showing summary data for each document. They will be available here until finalized by HR.

Status tracks the document's progress through the rating cycle and its approval process.


Period is the **Annual** (for the full rating cycle) or **Interim** period covered by the EPR.

Employee names the person this document is about.

Start Date and **End Date** mark the interval covered by the performance review.

My Roles lists the supervisory roles you hold for this employee.

Actions direct you to [View](#) the document and make updates when prompted or view the printable [JF-50D](#).

 You'll only see AWP's and EPR's for employees you support as a **Rating Supervisor**, **Reviewing Supervisor** or **Pool Supervisor**.

PERFORMANCE IMPROVEMENT PLANS

This section lists any **Performance Improvement Plans (PIPs)** you may be working on.

Status tracks the plan's progress through the PIP process.

Employee names the person this PIP was created for.

Start Date and **End Date** mark the interval covered by the plan.

Actions direct you to [View](#) the plan and make updates or view the printable [JF-50B](#).

 All supervisors can view PIPs but only the **Rating Supervisor** can update them.


APPEALS

If an employee lodges an **Appeal** against their scored EPR, you'll find it listed here.

Status tracks the document's progress through appeal process.

Employee names the person who lodged the appeal.

Actions direct you to [View](#) the appeal and make updates when prompted.

 Find documents faster using the **Global Filter** for each document type. Search for any listed criteria, such as employee name, document status, or your assigned roles.

FINDING EMPLOYEES

Get a list of the people you support from the [My Employees](#) menu option or the [EMPLOYEES](#) section of your dashboard. This area shows all the employees you're assigned to as a **Rating Supervisor**, **Reviewing Supervisor**, or **Pool Supervisor**.

It lists each employee's name, grade, pool, position and section. You'll see your own assigned supervisor roles and (when it's available) the employee's **Total Performance Score**.

The **Actions** you can take here depend on your **role** and the **status** of each document.

The screenshot shows the GoMBC interface for a supervisor. The sidebar on the left has a 'My Employees' menu item circled in red. The main area is titled 'My Employees' and contains a table with columns: Name, Grade, Pool, Position, Section, My Roles, and Total Score. Two employees are listed: Mitsopolis, Alanna (Grade 11, Pool Regional IM, Developer, EXEC, Rating Supervisor) and Lane, Solomon G. (Grade 13, Pool 2, Money Maker, ECON, Pool Supervisor). The 'Total Score' column for Lane shows a history of scores. A red circle highlights the 'Actions' column, which contains a 'View AWP' button and icons for document management.

Name	Grade	Pool	Position	Section	My Roles	Total Score
Mitsopolis, Alanna	11	Pool Regional IM	Developer	EXEC	Rating Supervisor	02/01/21 01/31/21 02/01/21 01/31/21
Lane, Solomon G.	13	Pool 2	Money Maker	ECON	Pool Supervisor	02/01/2020 01/31/2021 03/24/2021 08/03/2021, Score: 140 08/16/2021 12/17/2021, Score: 140 08/16/2021 12/17/2021, Score: 140

Find an employee from the main menu then select the appropriate action

Find people faster when you search by name, position, grade, section or pool with the **Global Filter**.

SUPERVISOR ACTIONS

[View AWP](#) directs you to the employee's current **Annual Work Plan**. Once the plan becomes an **Employee Performance Report**, this action updates to [View EPR](#).

[Employee's Current Documents](#) shows all reports, appeals or PIPs for the employee. From this view, select [Back](#) to return to the list.

[Initiate Annual Work Plan](#) creates an AWP ready for the next rating period.

[Initiate Performance Improvement Plan](#) opens a new PIP for the employee ready for you to fill out.

[History](#) is an archive of all documents previously completed for the employee.

You need to be a **Rating Supervisor** to create an AWP or PIP or see previously completed documents in GoMBC.

DIVE INTO POOLS

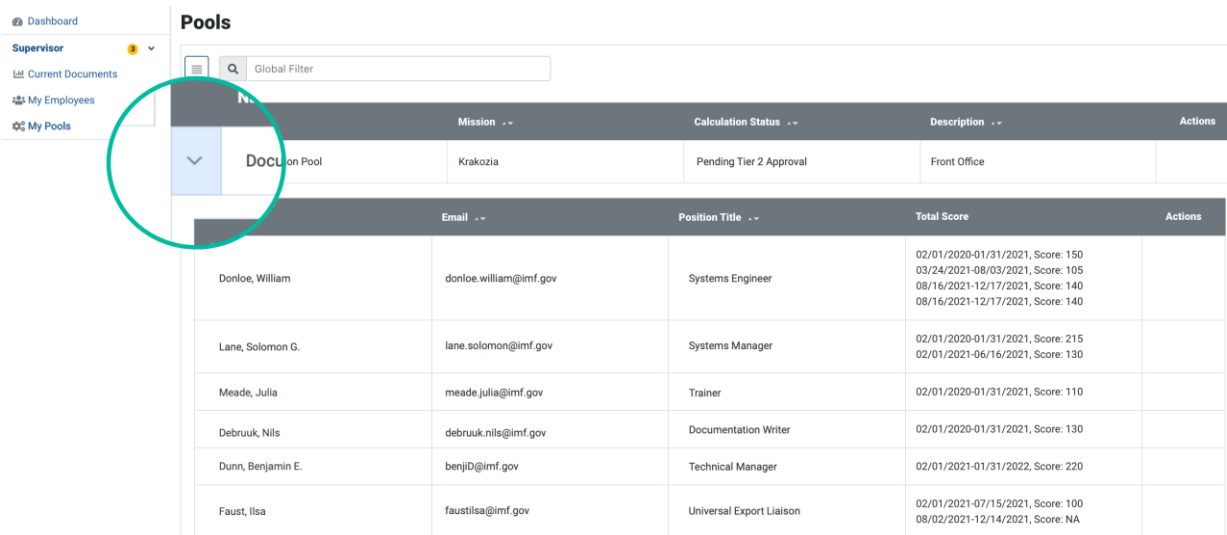
All eligible employees are grouped into **Performance Pools** used to calculate MBC rewards.

 **Rating Supervisors and Reviewing Supervisors** should not be placed in the same pool as employees they support.

For **Pool Supervisors**, visiting [My Pools](#) from the main menu brings up a list of performance pools you support.

You'll see each pool's name, mission, its status in the reward calculation status (provided by the **Reward Calculation Application**), and the pool description.

Hit the **Expand** control to see the pool's employees and (when available) their **Total Performance Score**. You'll also be able to [View EPR](#) once it is ready for your approval.

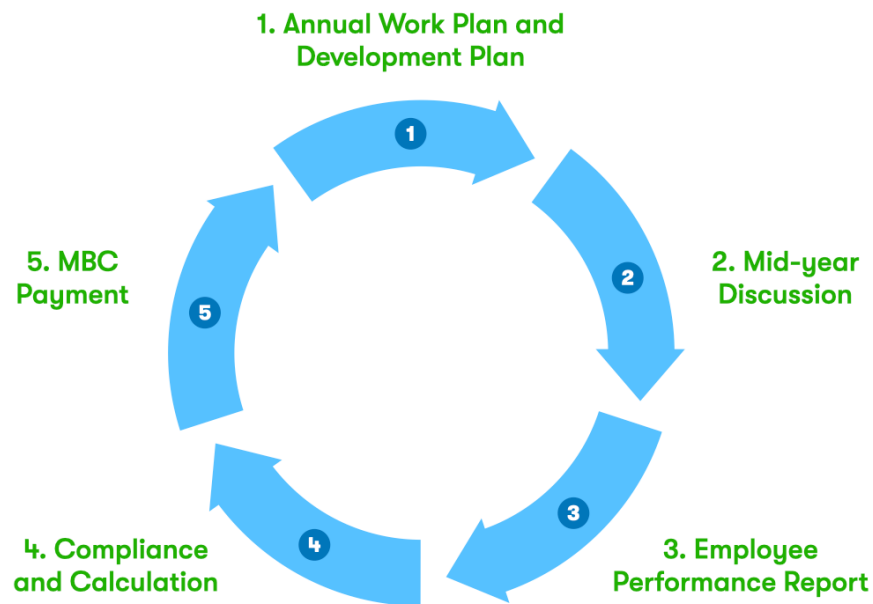


Dashboard				
Supervisor				
Current Documents				
My Employees				
My Pools				

Pools				
Global Filter				
Mission				
Calculation Status				
Description				
Actions				
Docu Pool				
Krakozia				
Pending Tier 2 Approval				
Front Office				
Expand				
Email				
Position Title				
Total Score				
Actions				
Donloe, William	donloe.william@imf.gov	Systems Engineer	02/01/2020-01/31/2021, Score: 150 03/24/2021-08/03/2021, Score: 105 08/16/2021-12/17/2021, Score: 140 08/16/2021-12/17/2021, Score: 140	
Lane, Solomon G.	lane.solomon@imf.gov	Systems Manager	02/01/2020-01/31/2021, Score: 215 02/01/2021-06/16/2021, Score: 130	
Meade, Julia	meade.julia@imf.gov	Trainer	02/01/2020-01/31/2021, Score: 110	
Debruuk, Nils	debruuk.nils@imf.gov	Documentation Writer	02/01/2020-01/31/2021, Score: 130	
Dunn, Benjamin E.	benjiD@imf.gov	Technical Manager	02/01/2021-01/31/2022, Score: 220	
Faust, Ilia	faustilia@imf.gov	Universal Export Liaison	02/01/2021-07/15/2021, Score: 100 08/02/2021-12/14/2021, Score: NA	

Pool Supervisors can find pools and their members under **My Pools**.

THE MBC RATING CYCLE



Before we look at how to use GoMBC throughout the rating cycle, let's review the main activities of the cycle itself.

- Define **Performance Criteria** at the start of the cycle by creating an **Annual Work Plan**
- Reflect on and document performance during the cycle with a **Mid-Year Discussion**
- Evaluate performance at the end of the cycle by completing the **Employee Performance Report**.

After all EPRs are completed, HR staff will calculate and notify all eligible employees of their annual MBC monetary reward.

DEFINING PERFORMANCE

When the rating cycle begins, you and your employee create an **Annual Work Plan (AWP)** and a **Development Plan** to set out the plan for the year ahead.

PERFORMANCE CRITERIA

These are the critical areas of performance your employee will be measured on during the rating cycle. The AWP defines performance criteria as:

- Continuing Responsibilities (mandatory)
- Specific Objectives (optional)
- Competencies (optional)
- Universal Job Elements (mandatory)

You will create 6—20 performance criteria and decide the importance of each for the performance period ahead. You should hold a discussion with your employee about these criteria at the start of the rating cycle.

DEVELOPMENT PLAN

You and your employee will schedule some activities to help the employee grow in a specific professional area. Activities are recorded in the **Development Plan**.

 You must schedule **at least one development activity** such as coursework, skills training, work shadowing or self-guided reading.


REFLECTING ON PERFORMANCE

Mid-way through the performance period (of either an **interim** or **annual** EPR), you will hold a formal discussion with your employee to see how things are going. Use this **Mid-Year Discussion** to get feedback on progress toward their **Performance Criteria**, make any adjustments, and talk about their accomplishments and challenges.

EVALUATING PERFORMANCE

At the end of the rating cycle, you will look at how well the employee has achieved the defined goals of the set **Performance Criteria**. When you first collaborated on the AWP, these criteria were balanced out, applying a **percentage weight** (5—20%) to each.

Now you need to add a rating level (0—3) to each criterion based on performance. Multiply each rating level by the percentage figure to get the performance criterion score. Then, add all performance criterion scores to reach the **Total Performance Score (TPS)**.

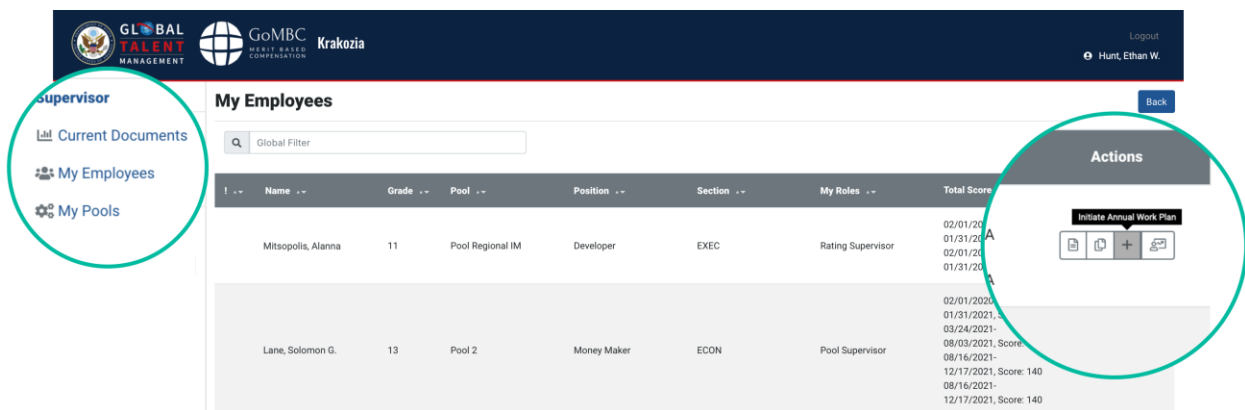
 Want to learn more about MBC reward eligibility? Talk to HR or review the **Performance Management Policy for MBC**.

ANNUAL WORK PLAN

As a **Rating Supervisor**, you will use GoMBC to create an **Annual Work Plan (AWP)** for each of your employees.

From the main menu, select [My Employees](#) to see a list of everyone you support, or search for an employee by name.

This shows each employee's position, grade, pool, and section, along with icons for different actions you can take. The one you want is [Initiate Annual Work Plan](#).



Find an employee from the main menu then select the appropriate action

INITIATING THE AWP

There are a few details to fill out before creating an AWP.

Initiate Annual Work Plan

For: Mitsopolis, Alanna

Back

Only the **Interim** review dates can be modified. When **Annual** review period is selected, dates are automatically populated from the mission profile. The Review period duration **must be longer than 30 days**. Existing review dates are prepopulated.

Review Period

Select a Value

Performance Year

2021-2022

Review Period Date Range

02/01/2021 - 01/31/2021

Is in Probationary Period

☐ No

Copy From


Select a Value

Cancel Initiate

Fill out these fields to initiate the Annual Work Plan.

REVIEW PERIOD

This refers to how long you will supervise the employee. If you're supporting them throughout the entire performance year, pick **Annual**. If you're planning to support them through part of the year (for example, if you're due to depart post), pick **Interim**.

 If you choose **Interim**, you will be asked to give a reason.

PERFORMANCE YEAR

This will be set automatically to the correct performance year.

REVIEW PERIOD DATE RANGE

If you chose an **Annual** review period, the correct date range is filled out automatically based on the cycle set by your mission. For **Interim**, fill out the dates covering your time as the employee's supervisor.

PROBATIONARY PERIOD

This refers to the employee's probation. If they are a new hire, you will likely set this to **Yes**.

COPY FROM (EXISTING EMPLOYEE INFO)

If this AWP is going to be similar to a previous one (either from the same employee, or someone else you support as a **Rating Supervisor**) then save yourself some time and copy from a previous record.

This copies over all the **Performance Criteria** from an existing AWP to get you started. You can edit these later.

Once that's all done, select **Initiate** to create the AWP template.

FILLING OUT THE AWP

You've now created the **Annual Work Plan**, but it's still mostly empty. In the next step you will add some employee details and set criteria for the new performance period.

You should now be looking at the AWP template for your chosen employee. Their name (and yours) is at the top of the form, along with the names of other supervisors who'll later approve the scored EPR.

The **Review Period** and **Date Range** carry over from the previous step.

The screenshot shows the 'Annual Work Plan (AWP)' form for an employee named Mitsopolis, Alanna. The form is titled 'Annual Work Plan (AWP)' and includes a 'View JF-50D form' button. The 'Employee Data' section is highlighted with a red circle and contains the following information: Employee name: Mitsopolis, Alanna; Status: AWP Created; Reviewing Supervisor: Donloe, William; Rating Supervisor: Sloane, Erica; Pool: Pool Regional IM; Pool Supervisor: Brassel, Theodore K. Below this is a note: 'Dates are automatically populated from mission profile. Existing review dates are marked.' and a dropdown menu with the text 'Only Interim review dates can be modified. When A'. The 'Review Period' section is partially visible. The 'Date of Position Description' section has a date input field and a checkbox labeled 'Is Position Description accurate?'. The 'Probationary Period' section includes a description: 'Rating Supervisor documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.' and fields for 'Start Date' and 'End Date'.

The initiated AWP with employee data and an option to print the JF-50D form.

 At any time, you can see the AWP as an official JF-50D form, ready for printing. Just select **View JF-50D form** to switch your view.

CONFIRMING JOB DETAILS


Fill out the date their job description was last classified (in the **Date of Position Description** box) and confirm that the position is accurate.

If the employee is on probation, add the start date of their **probationary period** and GoMBC will work out the correct end date. As a **Rating Supervisor** you will later be asked to certify whether the probationary period has been completed successfully.

Not sure how to answer these questions? Speak to your local HR.

DETAILS OF THE ANNUAL WORK PLAN

Now let's set out the **Performance Criteria** that you and your employee have discussed and agreed on. Remember, each can be labeled as either a **Continuing Responsibility**, **Specific Objective**, or **Competency**. Don't worry about **Universal Job Elements** right now—they get added automatically.

 The AWP must have 6—20 performance criteria including **Continuing Responsibilities** and **Universal Job Elements**.

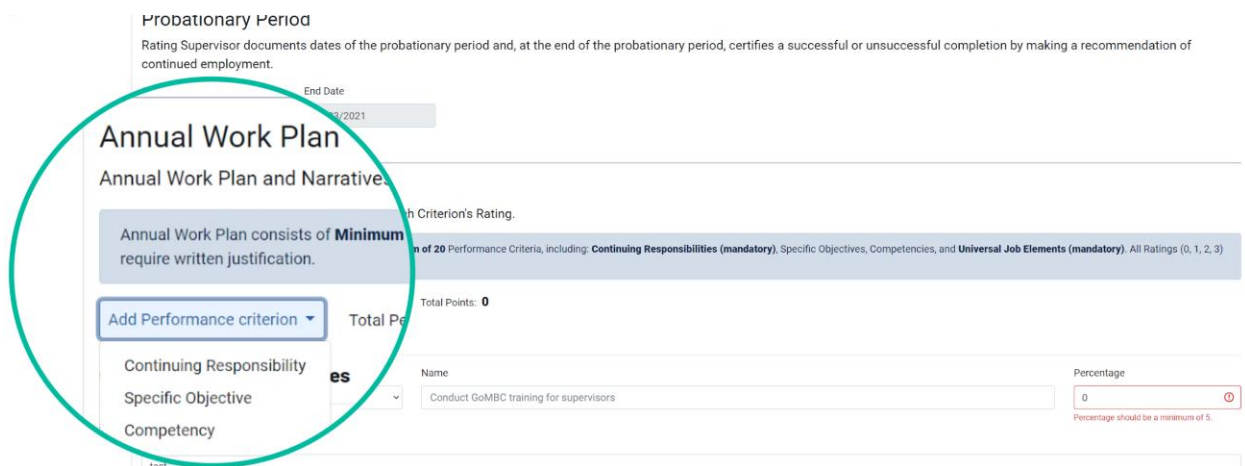
Select [Add Performance Criterion](#) to add your first goal to the AWP. Select a category, then give the objective an appropriate **name** and a **description**.

Give the performance criterion a **percentage** weight (5—20%) based on its overall importance during the performance period.

As soon as a performance criterion has a **name**, **description**, and **percentage** it gets saved automatically, along with any edits you make.

Continue adding more criteria in the same way by selecting [Add Performance Criterion](#) and picking a category.

As you add performance criterion the **Total Percentage** weight increases. This total includes percentages for **Universal Job Elements**.



Create a new performance criterion by first selecting its type.

UNIVERSAL JOB ELEMENTS

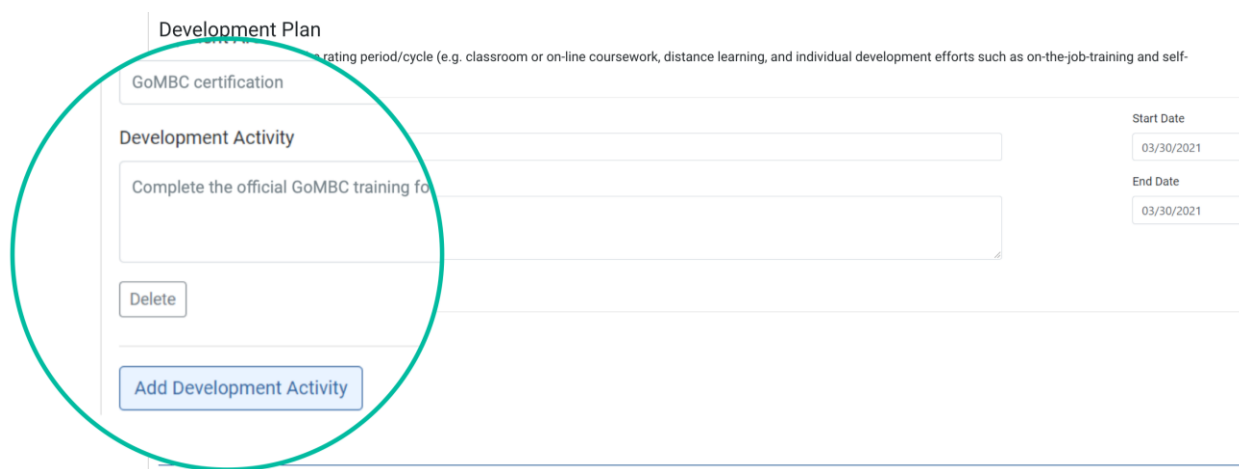
These criteria are set automatically for each employee. As a **Rating Supervisor**, you will decide how each should be weighted toward overall performance.

Speak to HR for more information on how best to weight these performance criteria.


DEVELOPMENT ACTIVITIES

Support your employee's performance and professional growth by adding activities to their **Development Plan**.

Select [Add Development Activity](#) and then enter a title for the development area, a description of the recommended activity, and dates of when the activity should happen.



The screenshot shows a 'Development Plan' form. At the top, there is a text input field for 'Rating period/cycle (e.g. classroom or on-line coursework, distance learning, and individual development efforts such as on-the-job-training and self-GoMBC certification)'. Below this is a section titled 'Development Activity' which contains a text input field for the activity description (e.g., 'Complete the official GoMBC training for') and two date input fields for 'Start Date' and 'End Date', both set to '03/30/2021'. At the bottom of this section is a 'Delete' button. Below the entire section is a blue button labeled 'Add Development Activity'. A red circle is drawn around the 'Add Development Activity' button and the 'Delete' button.

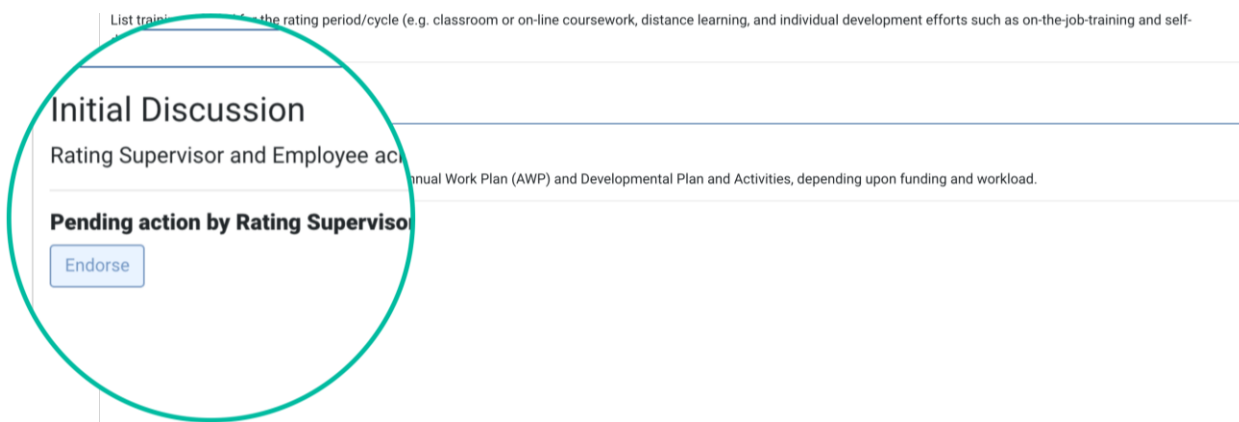
 You must add **at least one development activity** such as coursework, skills training, work shadowing or self-guided reading.

Like before, each activity is saved automatically along with any edits you make. Use [Add Development Activity](#) again to complete as many activities as you need.

CONFIRMING THE AWP

Now that you've created an **Annual Work Plan** and discussed it with your employee, it's time to make it official.

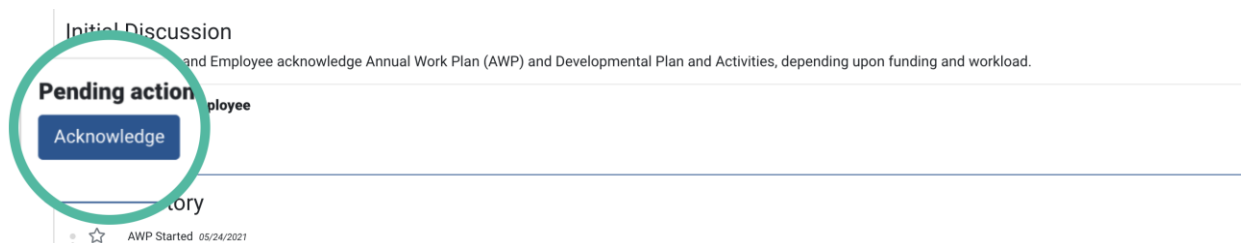
As the **Rating Supervisor**, go ahead and [Endorse](#) the plan. Selecting this will notify your employee that the AWP is ready for their acknowledgement in GoMBC.




The screenshot shows the 'Initial Discussion' section of the AWP form. It includes a text input field for 'Rating Supervisor and Employee acknowledgment of the Annual Work Plan (AWP) and Developmental Plan and Activities, depending upon funding and workload.' Below this is a section titled 'Pending action by Rating Supervisor' which contains a blue button labeled 'Endorse'. A red circle is drawn around the 'Endorse' button.

As the Rating Supervisor you should Endorse the completed AWP.

The employee will now [Acknowledge](#) their agreement in GoMBC, and the rating cycle is officially underway.






Employees are notified to Acknowledge their AWP.

 **Make sure to discuss the AWP with your employee before you [Endorse](#) it.**

CHECKING AWP STATUS

Employees, their supervisors, and HR staff can all track the status of an AWP. The **Status History** follows every update to the document, showing who did what.

Status History

-  AWP Started 03/30/2021
-  Endorsed by Rating Supervisor **Sloane, Erica** 03/30/2021
-  AWP Created 03/30/2021

Status History updates to show each recorded action on the AWP.

UPDATING THE AWP

You can make changes to the AWP in a defined timeframe before the end of the review period closes. Speak to your local HR if you have questions.

Locate your employee's **Annual Work Plan** by selecting [Current Documents](#) or [My Employees](#) from the main menu. The **Action** you want is [View AWP](#).

From here you can add or remove **Performance Criteria** and adjust percentage weightings.

 **Make sure to discuss any changes to the AWP with the employee first.**

MID-YEAR DISCUSSION

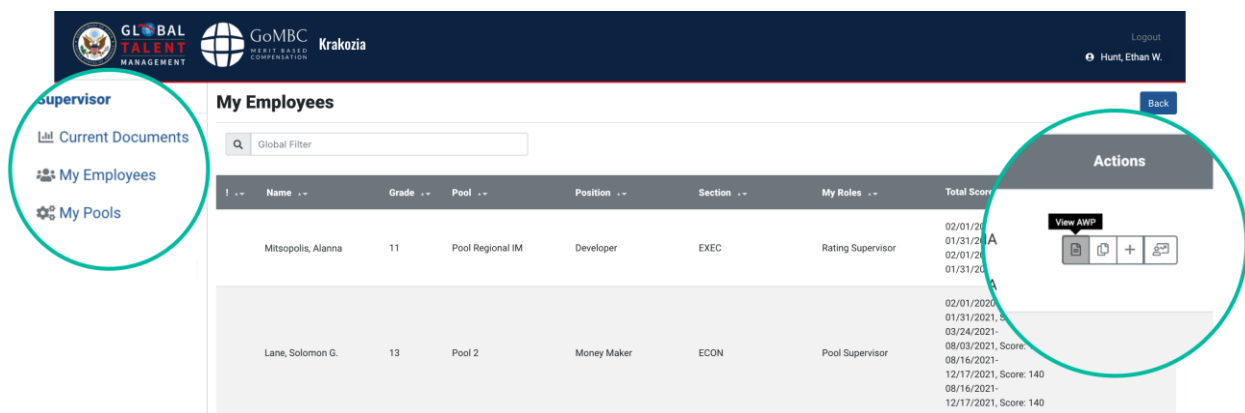
Closer to the middle of the rating cycle, you will schedule a discussion with your employee to talk about their performance toward the **Performance Criteria** set out in the **Annual Work Plan (AWP)**.

The **Mid-Year Discussion** helps you both comment on performance so far and make sure the criteria set out in the AWP are still appropriate. If adjustments are needed, this is the time to discuss and update the document.

UPDATING THE AWP

From the main menu, select [My Employees](#) to see a list of everyone you support, or [Current Documents](#) for a list of all pending documents.

Find the employee or document you would like to work with and select [View AWP](#).




Find an employee from the main menu then select the appropriate action

This brings up the employee's **Annual Work Plan**. Use this to frame your conversation, providing feedback on their performance across all performance criteria.

You won't record any performance rating scores yet, but if needed you can adjust the description or weighting of each **Performance Criterion**.

ADDING NEW OBJECTIVES

Select [Add Performance Criterion](#) to create any further items, adding a **title**, **description** and **weighting** for each.

 You can't add new performance criteria if the percentage total is 100%. First remove or adjust the weight of existing items.

Annual Work Plan

Assess and Narratives Justifying Each Criterion's Rating.

Maximum of 6 and Maximum of 20 Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All

[Add Performance criterion](#)

Percentage: 95% Total Points: 0

Continuing Responsibility

Type: Continuing Responsibility

Name: Submit weekly intelligence reports

Percentage: 10

Description: Report and summarize

Specific Objectives

Type: Specific Objective

Name: Deliver GoMBC training

Percentage: 15

Description: Conduct training sessions on GoMBC to assigned supervisors


Adjust the number and weighting of performance criteria as needed.

This is also a good time to review the employee's **Development Plan**, adding new activities to help them meet their goals. Select [Add Development Activity](#) and then enter a title for the development area, a description of the recommended activity, and dates of when the activity should happen.

CERTIFYING THE MID-YEAR DISCUSSION

Following your conversation and any changes to the AWP, it's time to certify the document. You still need to do this even if the AWP remains unchanged.

Add comments to summarize your mid-year discussion and select [Endorse](#). This updates the **Status History** to record that the discussion happened. GoMBC then notifies your employee to [Acknowledge](#) the discussion and any changes to the AWP.

 MYD comments are mandatory but you're free to update them later. Just **Endorse** any changes you make and GoMBC will prompt the employee to **Acknowledge** them.

Mid-Year Discussion and Certification

Pending action by Rating Supervisor

Great work s... looking forward to the rest of the year.

[Endorse](#)

History


- ☆ AWP Acknowledged 07/02/20
- ✓ Acknowledged by Mistopolis, Alanna 06/29/20
- ☆ AWP Started 02/14/20

EMPLOYEE PERFORMANCE REPORT

At the end of the performance period, you and your employee will check in again to formally assess performance. As the **Rating Supervisor**, you will need to **score** each of the **Performance Criteria** set out in the **Employee Performance Report (EPR)**.

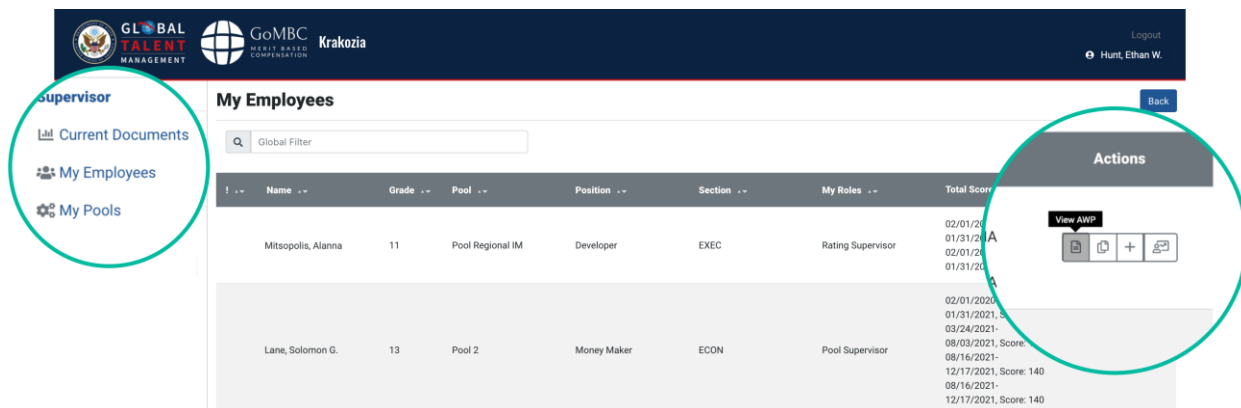
Following your endorsement, it will be cleared by the **Reviewing Supervisor** and approved by the **Pool Supervisor** before finally passing to HR for final approval and release to the employee by the **Rating Supervisor**. The **Total Performance Score** recorded on the EPR is then used to calculate the employee's MBC reward.

Each of the **Performance Criteria** is scored from 0—3. For a full rundown on the rating scale, see the **LE Staff Handbook, Performance Management Policy for MBC** or ask your local HR.

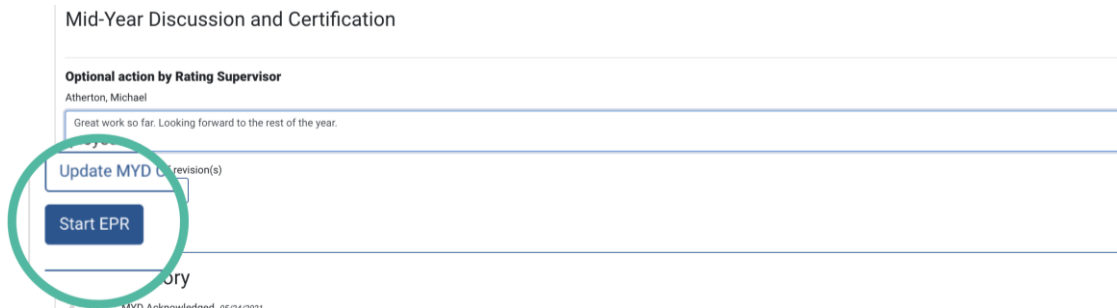
 The employee must have been in their job for 120 days with the same Rating Supervisor before their performance can be scored.

STARTING THE REVIEW


Return to your employee's **Annual Work Plan** by selecting [Current Documents](#) or [My Employees](#) from the main menu.



The AWP should look just as you left it after the **Mid-Year Discussion**. Select **Start EPR** (at the end of the form) to begin adding ratings.

The screenshot shows the 'Mid-Year Discussion and Certification' form. It includes a section for 'Optional action by Rating Supervisor' with a text area containing 'Great work so far. Looking forward to the rest of the year.' Below this is a button labeled 'Update MYD' and a button labeled 'Start EPR', which is circled in green. The bottom of the form shows 'MYD Acknowledged 05/24/2021'.

ADDING RATINGS

 You can only start scoring the EPR after the **Rating Supervisor** and **Employee** both acknowledge the MYD.

Check over the document to make sure the details are correct. As the **Rating Supervisor**, you first need to record when the employee's position description was last classified. Enter a date in the Date of Position Description box and confirm whether the position description is accurate.

 Ask your local HR for a copy of the **Position Description** or advice on updating its contents.

In the Annual Work Plan section, find the employee's Continuing Responsibilities, Specific Objectives, Competencies, and Universal Job Elements.

Add a **Score** (0—3) to each of these criteria and provide a written **Justification** for your score. Make sure to include specific examples to illustrate your decision. Your updates are saved automatically. Once you **Endorse** the EPR, your scores are shared with the **Reviewing Supervisor**, **Pool Supervisor**, and **HR**. Employees won't see ratings until the EPR is fully approved by the Pool Supervisor and released to them by the Rating Supervisor.

Annual Work Plan
Annual Work Plan and Narratives Justifying Each Criterion's Rating.

Annual Work Plan consists of **Minimum of 6** and **Maximum of 20** Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All Ratings (0, 1, 2, 3) require written justification.

Continuing Responsibilities

Criterion	Percent
Submit weekly intelligence reports	Percent: 10 %
Summarize briefings for DCM	

Score

Justification

Reports consistently delivered on time and cited as highly effective. New digital distribution methods and archiving exceeded expectations.

Specific Objectives

Criterion	Percent
Deliver GoMBC training	Percent: 15 %
Conduct training sessions on GoMBC for Supervisors	

Score

Justification

Excellent training program delivered to all eligible staff, including development of reusable materials and scheduling of sessions. Excellent work!

 Scores and justifications are **required** for all **Performance Criteria**.

DEVELOPMENT ACTIVITIES

Activities listed in the **Development Plan** are not scored. You should still use this space to certify completion of development activities throughout the rating period.

CERTIFYING THE EPR

With all your scores and justifications now in, it's time to start the certification process. Here's what happens next.

1. The process begins when as **Rating Supervisor**, you **Endorse** the EPR.
2. The **Reviewing Supervisor** is notified by email of each performance report endorsed by the **Rating Supervisor**.
3. The **Reviewing Supervisor** checks the EPR. If all looks good, they **Approve** it. If they disagree with any ratings or justifications, they can **Return** it to the **Rating Supervisor** for changes. Approved documents are then passed to the **Pool Supervisor**.
4. The **Pool Supervisor** reviews every EPR in a performance pool. As before, they can **Approve** each document as final or **Return** it with feedback to the original **Rating Supervisor**. Each EPR they approve is passed to **HR**.
5. **HR** will check all documents for inadmissible comments and either **Approve** or **Return** to the **Rating Supervisor** with their own comments.
6. With the EPR now certified by all supervisors, the **Rating Supervisor** takes action to Release the document to the **Employee** who sees their rating for the first time. They have up to 5 business days to add their own comments and either **Acknowledge** the EPR or start an **Appeal**.
7. Any comments the employee adds to their acknowledgement are shared with all supervisors. They have 5 business days to review and respond to the employee before the EPR is **finalized** by HR. The final **Total Performance Score** is used to calculate the employee's MBC reward.

End of Rating Period/Cycle Certification

Signatures confirm that Rating Supervisor and Employee have discussed the contents of the AWP at the end of the rating period/cycle. Employee's signature does not necessarily constitute agreement with the rating.

Pending action by Rating Supervisor

Overall excellent performance this year.

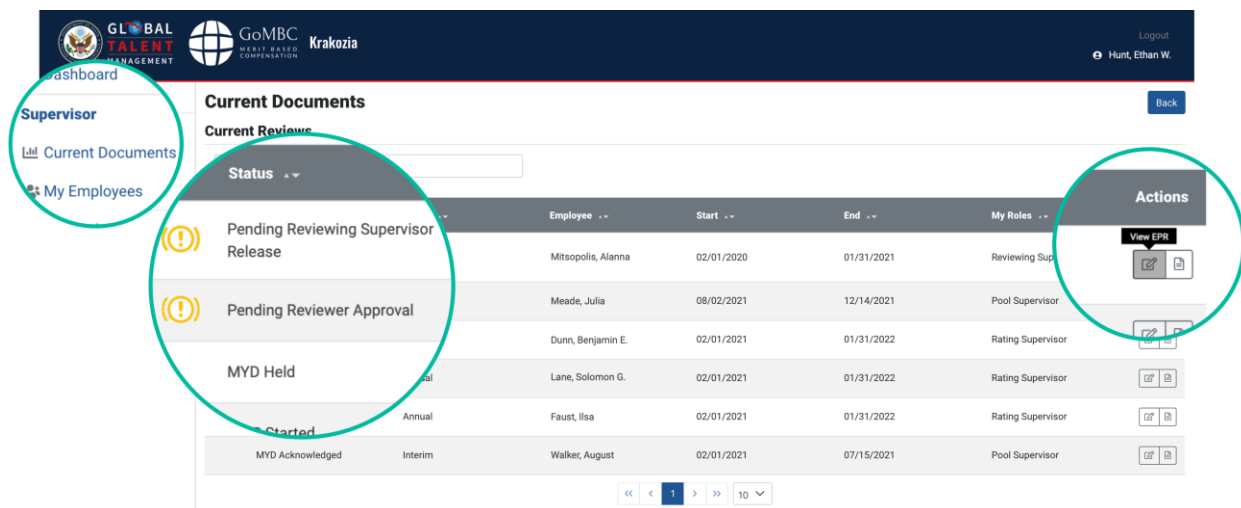
Endorse

EPR certification begins when the Rating Supervisor selects **Endorse**.


REVIEWING AND POOL SUPERVISORS

As a **Reviewing Supervisor** or **Pool Supervisor**, you will move the certification process forward by acting on EPRs that need your review.

Use the **Dashboard** (or go to [Current Documents](#) from the main menu) to see the supervised **Reviews** you need to act on. If you hold more than one supervisor role, you will find the documents all gathered in the same place.

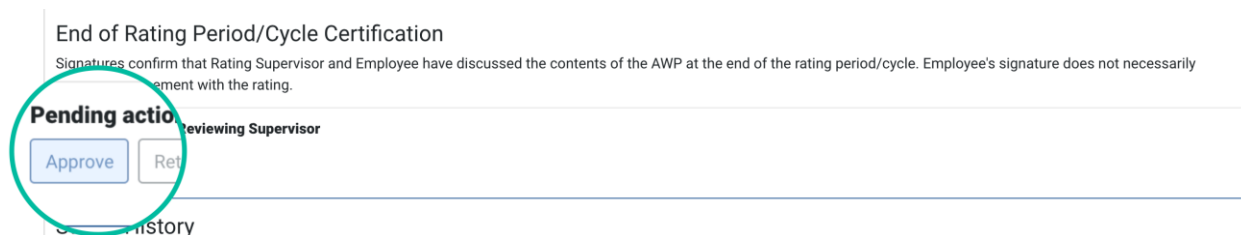


Find EPRs ready for review under Current Documents then select **View EPR**.


 This icon will alert you to documents that need urgent attention. You'll also get an email reminder of any pending actions.

To review an EPR, select [View EPR](#) from the **Actions** available. This brings up the document, including scores and justifications from the **Rating Supervisor**.

At the end of the form there's a box for your comments. These are not shared with the employee. From here you can [Approve](#) the EPR to go forward (to either the **Pool Supervisor** or HR, depending on your role), or [Return](#) it to the **Rating Supervisor** for changes.



As a Rating Supervisor or Pool Supervisor you will Approve or Return EPRs assigned to you.

 The **Status History** records each action taken on the document. The history shows whether comments made are hidden from the employee.

RELEASING THE EPR

Once HR chooses to [Approve](#) the EPR, the **Rating Supervisor** is alerted to release the document to the employee. Just as before, find the EPR listed under [Current Documents](#) then select the [View EPR](#) action.

Head for the box at the end of the form to add your comments to be shared with the employee and recorded on their EPR.

Once you [Release](#) the performance report, the employee will be notified to view it. This is when they will see their ratings for the first time.

End of Rating Period/Cycle Certification

Signatures confirm that Rating Supervisor and Employee have discussed the contents of the AWP at the end of the rating period/cycle. Employee's signature does not necessarily represent agreement with the rating.

Pending action Rating Supervisor

[Release](#)

Status History

- ⚙️ Pending Rating Supervisor Release 05/24/2021

Release the EPR to share ratings with the employee.

MANAGING PROBATION

When an employee first starts working as an LE staff member, they will likely need to serve a **probationary period**. During this time, they have the opportunity to demonstrate an ability to perform the job they were hired for.

As the **Rating Supervisor**, you will record when this **Probationary Period** begins in the employee's **Annual Work Plan**.

During the probationary period, you will evaluate the employee's actual job performance to determine continued employment with the mission.

An employee must successfully complete the probationary period for continued employment. When the probationary period ends, you need to **Certify** your recommendation of their continued employment, **Request Extension** of the probationary period, or identify that the employee has not adequately performed assigned duties.

STARTING PROBATION

Find your employee by selecting [My Employees](#) from the main menu. If you haven't yet set up an AWP, then choose [Initiate Annual Work Plan](#) from the available actions. If it's already there, pick [View AWP](#).

The screenshot shows the GoMBC Supervisor interface. On the left, a sidebar menu is circled in green, containing 'Current Documents', 'My Employees', and 'My Pools'. The 'My Employees' option is selected. The main area displays a table titled 'My Employees' with columns: Name, Grade, Pool, Position, Section, My Roles, and Total Score. Two employees are listed: Mitsopolis, Alanna and Lane, Solomon G. To the right of the table, an 'Actions' menu is circled in green, showing 'Initiate Annual Work Plan' and 'View AWP' (represented by a document icon).

Name	Grade	Pool	Position	Section	My Roles	Total Score
Mitsopolis, Alanna	11	Pool Regional IM	Developer	EXEC	Rating Supervisor	02/01/2020 - 01/31/2021, Score: 140 02/01/2021 - 01/31/2022, Score: 140
Lane, Solomon G.	13	Pool 2	Money Maker	ECON	Pool Supervisor	02/01/2020 - 01/31/2021, Score: 140 03/24/2021 - 08/03/2021, Score: 140 08/16/2021 - 12/17/2021, Score: 140 08/16/2021 - 12/17/2021, Score: 140

Find an employee from the main menu then select the appropriate action.



Full details on how to fill out an AWP are in the **Annual Work Plan** section.

Inside the AWP, set the [Is In Probationary Period](#) switch in the **Employee Data** section to [Yes](#).

In the **Probationary Period** section enter probation's **Start Date** and GoMBC will automatically calculate the end date. Speak to HR if the probationary period length shown in GoMBC isn't correct.

Rating Supervisor Date Range
02/01/2021 - 07/02/2021

Is in Probationary Period
☒ Yes

Date of Position Description
07/02/2020

Is Position Description accurate?
☒ Yes

Probationary Period
Recommendation documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.

Start Date
05/19/2021

End Date
05/29/2021

Rating Supervisor
Rating Supervisor's Rating.

Performance Criteria
Maximum of 20 Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All

Confirm the probation and select a start date using the calendar picker.

ENDING PROBATION

You will be notified in [Current Documents](#) of employees who have completed their probationary period. For each employee, select [View AWP](#) to return to their Annual Work Plan. When certifying the probationary period, you have the option to recommend the employee for:

COMPLETION OF PROBATION AND CONTINUATION OF EMPLOYMENT

If the employee has performed satisfactorily during the probationary period, you should certify your recommendation of their continued employment.

In the AWP's **Probationary Period** section, set the [Is Employee recommended for continued employment?](#) switch to **Yes**. Hit [Certify](#) to confirm your recommendation and the probation's completion.

Probationary Period
Rating Supervisor documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.

Start Date
11/30/2020

End Date
05/29/2021

Request extension

Is Employee recommended for continued employment?
☒ Yes

Pending Pending by Rating Supervisor

[Certify](#)

Recommendation documents dates of the probationary period and, at the end of the probationary period, certifies a successful or unsuccessful completion by making a recommendation of continued employment.

Performance Criteria
Maximum of 20 Performance Criteria, including: **Continuing Responsibilities (mandatory)**, Specific Objectives, Competencies, and **Universal Job Elements (mandatory)**. All

Select Certify to confirm your recommendation and complete the probation.

EXTENSION OF THE PROBATIONARY PERIOD

Subject to local law, if you need further evaluation of the employee's ability to perform their job you can ask HR to extend the probationary period.

In the AWP's **Probationary Period** section, select [Request extension](#). HR may want to understand your reasons and will either approve or reject your request. Probation for each employee can only be extended once.

SEPARATION

Subject to local law, if an employee does not perform satisfactorily at any time during the probationary period you may decide not to recommend their continued employment. Notify HR as soon as possible about any issues with the employee's performance.

In the AWP's **Probationary Period** section, set the [Is Employee recommended for continued employment?](#) switch to [No](#).



Subject to local labor laws, employees on probation may not receive MBC rewards.

PERFORMANCE IMPROVEMENT PLAN

If you believe there are serious issues affecting your employee's work, you should consider documenting poor performance in a **Performance Improvement Plan (PIP)**.

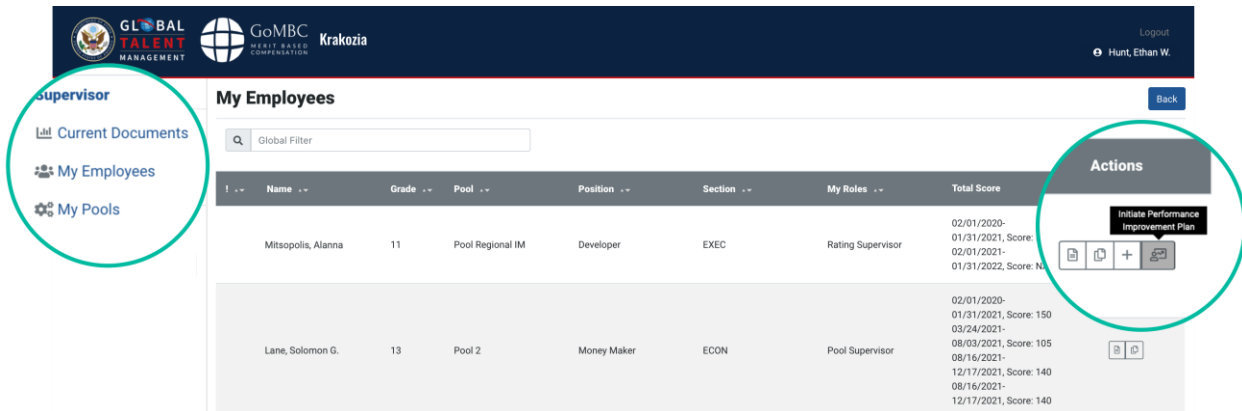
The PIP is a comprehensive plan that assists employees in improving their performance within a set time period. It provides guidance on the actions needed to improve performance with support from the Rating Supervisor. The PIP outlines how this supervisor will aid the employee in this process.

 Ask HR for specific guidance on dealing with serious performance or conduct issues.

CREATING A PIP

As a **Rating Supervisor**, you can start a PIP at any time. PIPs must be created in GoMBC when an employee receives a **Total Performance Score** of less than 100 on their EPR.

To create a PIP manually, first find the employee by selecting **My Employees** from the main menu. The **Action** to take here is **Initiate Performance Improvement Plan**.

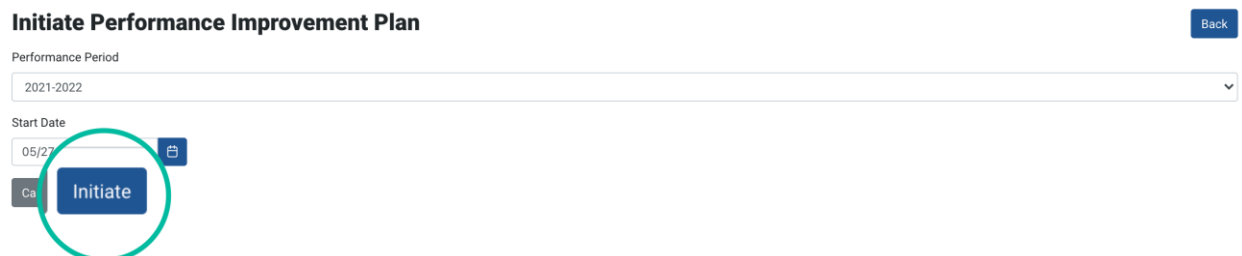


The screenshot shows the GoMBC Supervisor interface. On the left, a sidebar menu has 'My Employees' circled in green. The main area displays a table of employees. The first employee, Mitsopolis, Alanna, has a Total Score of 11. The 'Actions' column for this employee is circled in green, showing a button labeled 'Initiate Performance Improvement Plan'. Below this, another employee, Lane, Solomon G., is listed with a Total Score of 13.

Name	Grade	Pool	Position	Section	My Roles	Total Score
Mitsopolis, Alanna	11	Pool Regional IM	Developer	EXEC	Rating Supervisor	02/01/2020-01/31/2021, Score: 105 02/01/2021-01/31/2022, Score: N
Lane, Solomon G.	13	Pool 2	Money Maker	ECON	Pool Supervisor	02/01/2020-01/31/2021, Score: 150 03/24/2021-08/03/2021, Score: 105 08/16/2021-12/17/2021, Score: 140 08/16/2021-12/17/2021, Score: 140

Find an employee from the main menu then select the appropriate action.

Select the **Performance Period** the plan covers and the date it should start. Select **Initiate** to begin filling out the plan.



The screenshot shows the 'Initiate Performance Improvement Plan' form. It has a 'Performance Period' dropdown menu set to '2021-2022'. Below it is a 'Start Date' field with a calendar icon, showing '05/27'. At the bottom left, there is a blue 'Initiate' button circled in green. A 'Back' button is in the top right corner.


SECTION 1—EMPLOYEE DATA

Confirm the employee's details are correct. The **Performance Period** and **Start Date** are carried over from the previous step, though you can adjust them here while editing the document.

 At any time, you can see the PIP as an official **JF-50B** form, ready for printing. Just select **View JF-50B form** to switch your view.

SECTION 2—AREAS FOR IMPROVEMENT

Fill out details of your specific concerns, directly relating to the employee's **Position Description** or **Annual Work Plan**. Provide examples (including dates) of issues you've observed to need improvement.

 Your comments are saved automatically as you type but aren't shared with the employee until you **Endorse** the PIP and HR **Approves** it.

SECTION 3—REASONS FOR IMPROVEMENT

Add specific reasons why you consider the employee's performance to be ineffective. Examples include missed deadlines, substandard work, or interpersonal conflict.

SECTION 4—ACTIONS NEEDED

List the actions the employee must complete to improve their performance. Examples include formal training, counselling, or learning from co-workers. Where appropriate, provide details on the schedule and expected outcomes of these activities.

SECTION 5—ASSISTANCE PROVIDED

Add the actions **you** will take to support the employee's improvement. This could include closer monitoring of their work, setting checklists, and scheduling regular feedback.

SECTION 6—TIMEFRAME

Enter the period of calendar days this PIP should cover. Make sure to give the employee enough time and support (at least 30 days) to reach an acceptable level of performance. Most PIPs run 30—120 days, though can run up to the end of the current rating cycle.

SECTION 7—SIGNATURES

Enter any closing comments as **Rating Supervisor**, then [Endorse](#) the Performance Improvement Plan.

SHARING THE PIP

Your endorsed draft of the PIP is now pending HR review. HR now checks the document before they [Approve](#) or [Return](#) for adjustment.

In both cases the PIP returns to you as the **Rating Supervisor**. If the PIP is approved by HR, it's time to share it with the employee.

SHARING WITH THE EMPLOYEE

Return to the PIP document by selecting [Current Documents](#) from the main menu. In the **Performance Improvement Plans** section, you will see the PIP's status and the **Action** to [View Performance Improvement Plan](#).


Status	Employee	Start	End	Action
PIP Created	Smith, Joe	02/11/2021	02/11/2021	View Performance Improvement Plan

At the bottom of the document you should [Endorse](#) the PIP once again. This releases it to the employee and prompts them to review its contents.

Once the PIP is released, the employee has 5 days to add their own comments and [Acknowledge](#) the document in GoMBC.



The screenshot shows a section titled "Rating Supervisor" with the name "Faust, Ilisa". Below this is a text area containing the phrase "ers to be a fair plan for improvement." At the bottom of this section, a blue button labeled "Endorse" is circled in green. Below the text area, there is a horizontal line and a section titled "Change History" with the instruction "Endorse the HR-approved PIP to release it to the employee."

 [Ask HR about proper procedure for sharing a PIP with the employee.](#)

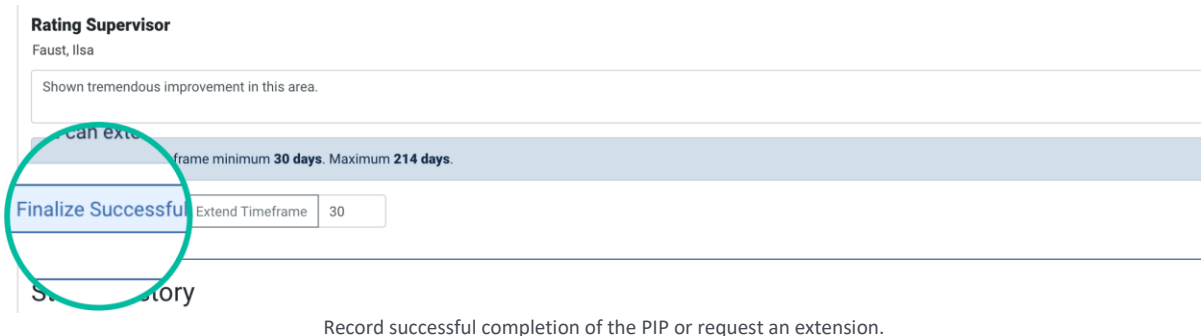
REVIEWING PERFORMANCE

At the end of the PIP timeframe, you need to formally review this progress. If the employee has shown acceptable performance in the areas identified, as the **Rating Supervisor** you now need to finalize the PIP document, confirming the end of the process.


Return to the PIP document by selecting [Current Documents](#) from the main menu and locating the document in the **Performance Improvement Plans** section. The **Action** to take is [View Performance Improvement Plan](#).

You can't edit the document at this point, but at the bottom you should now [Initiate Performance Improvement Plan Review](#).

Section 7 of the PIP now provides options to [Finalize Successfully](#) (ending the PIP if the employee has returned to acceptable performance) or [Extend Timeframe](#) if further improvement is needed.



The screenshot shows the same "Rating Supervisor" section as before, but with a different text area: "Shown tremendous improvement in this area." Below this is a blue bar with the text "can extend timeframe minimum 30 days. Maximum 214 days." At the bottom, there are two buttons: "Finalize Successfully" (circled in green) and "Extend Timeframe" (with a value of "30" next to it). Below these buttons is a horizontal line and a section titled "Record successful completion of the PIP or request an extension."

 [Once you finalize the PIP, the document no longer appears in Current Documents. However, you can still find it in your History.](#)

EXTENDING THE TIMEFRAME

In some cases, you may need to extend the PIP period. Speak to HR and the employee before requesting an extension.

To extend the PIP period, add the calendar days the extension will run and write a justification for your request. Select [Extend Timeframe](#) to pass this request to HR.

HR may [Approve](#) the extension, or deny it and [Return](#) the document to you. If your extension request is denied, you now need to decide whether the employee has completed the PIP to your satisfaction. Select [Finalize Successfully](#) or [Finalize Unsuccessfully](#), adding a justification for your decision.

If HR does [Approve](#) the extension, you will be notified to [Endorse](#) the PIP's new timeframe. At the end of this period, you will need to [Finalize Successfully](#) or [Finalize Unsuccessfully](#) the document.

A PIP can only be extended once. The extension runs for a minimum of 30 days and can't go beyond the end of the current rating cycle. Even when extended, the PIP covers the same areas of improvement as before. For new cases of ineffective performance from the same employee, create a separate PIP.

APPEALS

When your employee first receives their scored **Employee Performance Report (EPR)**, they have the option to add their comments and then Acknowledge the document as correct or Initiate Appeal if they have concerns about their EPR or the review process. Appeals must be lodged within 5 business days of receiving the scored EPR.

End of Rating Period/Cycle Certification

Signatures confirm that Rating Supervisor and Employee have discussed the contents of the AWP at the end of the rating period/cycle. Employee's signature does not necessarily constitute agreement with the rating.

Pending action by Employee

Vintner, Janik

I don't think this is...

Acknowledged

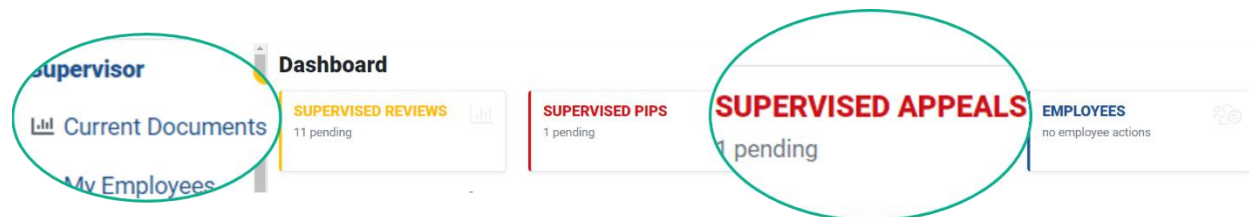
Initiate Appeal

Status History

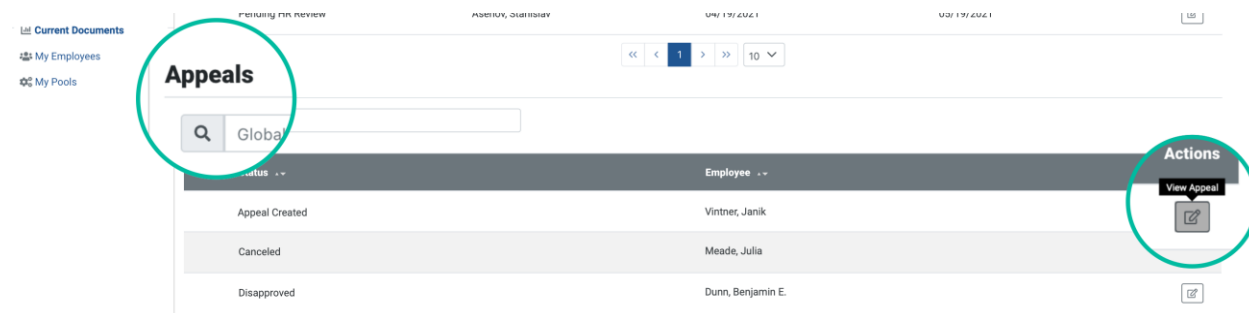
☆ Pending Employee Acknowledgement 05/31/2021

On receiving their scored EPR, the employee can initiate an appeal.

As the **Rating Supervisor**, you will be notified of the employee's appeal. Find it under **Appeals** in **Current Documents** or through the **APPEALS** section of the dashboard.



The **Action** to take is **View Appeal**.




Find appeals under the named section of **Current Documents**.

The appeal shows its current status and comments left by the employee. **View Review** directs you to the employee's EPR.

You have 5 business days to add your comments for the employee and [Approve](#) or [Disapprove](#) the appeal. Approving the appeal will re-open the employee's EPR for your review. The process of scoring and approval by supervisors and HR begins again.

If you choose to disapprove the appeal, the employee will be notified. They have the option to [Cancel](#) their appeal or escalate it to the **Reviewing Supervisor**. Once again, this supervisor can [Approve](#) or [Disapprove](#) the appeal.

If the **Reviewing Supervisor** chooses to disapprove the appeal, the employee can escalate to the **Pool Supervisor**. As before, they can [Approve](#) or [Disapprove](#) the appeal.

 Only one appeal is allowed for each **Employee Performance Report**. Once the appeal is approved, disapproved or cancelled, a second appeal cannot be lodged.

Appeal

Back

Data

Status: Pending Rating Supervisor Review
Employee: Vintner, Janik
Rating Supervisor: Faust, Ilse
Reviewing Supervisor: Donloe, William
Pool Supervisor: Kessel, Theodore K.

View Review

Content

I don't think this is fair.

Comments

- Submitted by Employee **Vintner, Janik** 03/05/2021

Signatures

Pending action by Rating Supervisor
Faust, Ilse

I agree they have a point here.

Approve


Disapprove

Each supervisor has the opportunity to approve or disapprove the employee's appeal.

 If the employee's **Rating Supervisor** and **Reviewing Supervisor** are the same person, the employee can escalate directly to the **Pool Supervisor**.

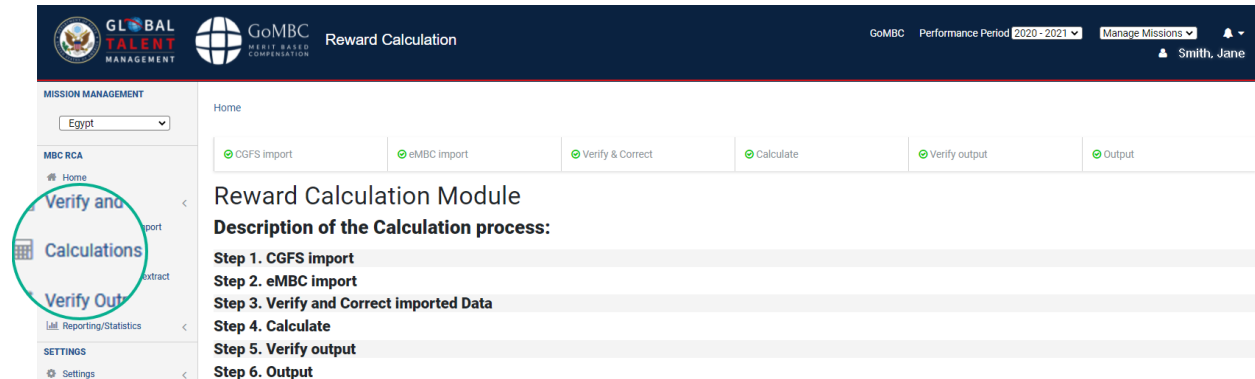
The **Pool Supervisor** normally makes the final call on the employee's appeal. However, in cases where all 3 supervisors are the same person, the employee can lodge their appeal directly with the **Deputy Chief of Mission (DCM)**. The DCM can then [Approve](#) or [Disapprove](#) the appeal. Approving the appeal causes the EPR to be re-opened for review by the **Rating Supervisor**. Disapproving the appeal at this final stage notifies employee that their appeal was unsuccessful and requests their acknowledgement.

When an appeal is cancelled (at any time by the employee) the scored EPR is returned to the employee for acknowledgement.

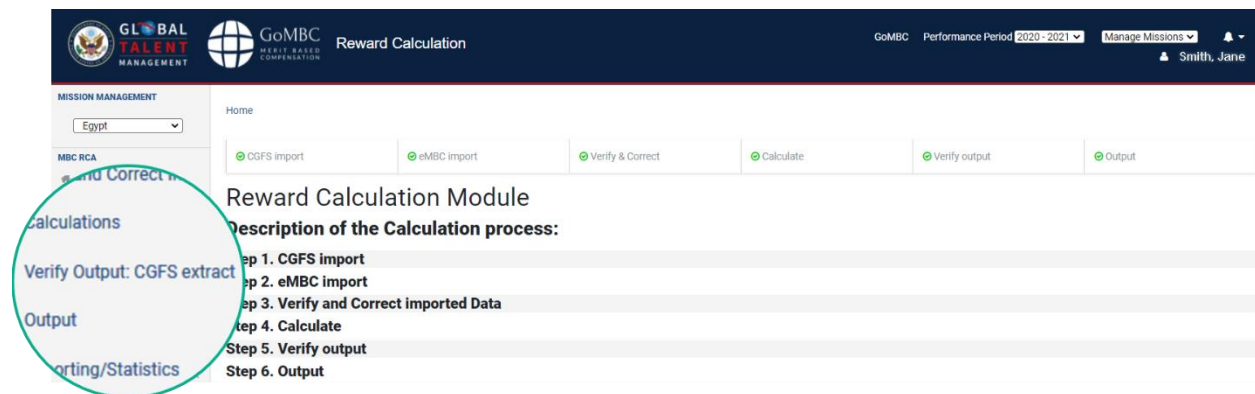
 Employees, their supervisors, and HR staff can all track the status of an appeal. The **Status History** follows every update to the document, showing who did what.

APPROVING CALCULATIONS IN RCA

If the GoMBC **Reward Calculation Specialist** has requested your **digital** approval of the reward calculations, you will be notified when its ready for review. Sign in to RCA and from the RCA menu select [Calculations](#) to study the figures.



If everything looks good, proceed to **Verify Output** (or select [Verify Output: CGFS Extract](#) from the RCA menu).



Next to your name, select [Approve](#).

Tier 1 Approvers : Approved

Pool Name	Approval Status
Med Unit Pool	Not Approved
Digital Approval	Approver Name Smith, Jane Act Approve

If you need to approve using **paper**, the **Reward Calculation Specialist** will provide you with a PDF document of the calculations for your signature. They will then upload this signed PDF to RCA.

TIER 1 APPROVAL

This step completes when all **Pool Supervisors** have reviewed and approved calculations for their pools. During this time, supervisors can undo their approval step by selecting [Recall Approval](#) from the **Verify Output** section.

TIER 2 APPROVAL

This step completes when the **HRO** or **Management Officer** reviews the calculations approved by each **Pool Supervisor**. They can [Approve](#) in RCA once everything looks good and can later [Recall Approval](#) if needed.

TIER 3 APPROVAL

This step completes when the **DCM** is satisfied with all calculations for their mission. They can [Approve](#) in RCA once everything looks good and can later [Recall Approval](#) if needed.